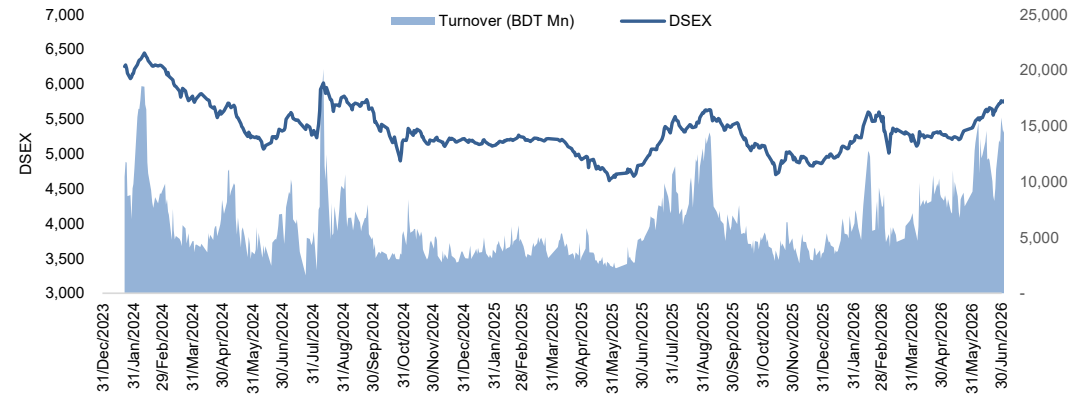


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.14%) gained 8.44 points and closed at 5,894.13. The blue-chip index DS30 (-0.11%), the Shariah-based index DSES (-0.04%), and the large-cap index CDSET (+0.07%) closed at 2,201.75, 1,185.98, and 1,154.35 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 0.43% followed by Food & Allied (-0.30%), Telecommunication (-0.28%), Fuel & Power (-0.11%), Bank (-0.02%), Pharmaceutical (+0.03%), and NBFI (+0.24%), respectively. Block trades contributed 3.3% of the overall market turnover. ACME Pesticides Limited (+7.8%) was the most traded share with a turnover of BDT 360 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,894.13	5,885.69	+8.44	+0.14%	+21.1%
DS30	2,201.75	2,204.17	-2.42	-0.11%	+18.8%
DSES	1,185.98	1,186.48	-0.49	-0.04%	+18.5%
CDSET	1,154.35	1,153.59	+0.76	+0.07%	+14.9%

	Advanced	Declined	Unchanged	Total
All Category	170	176	45	391
A Category (Equity)	92	84	21	197
B Category (Equity)	24	47	3	74
N Category (Equity)	0	0	0	0
Z Category (Equity)	54	45	21	120
Mutual Funds	10	19	5	34
Corporate Bonds	2	1	1	4
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,104,492	7,080,036	+0.3%
	Mn USD	57,390	57,193	
Turnover	Mn BDT	11,115	12,105	-8.2%
	Mn USD	90	98	
Volume	Mn Shares	441	488	-9.8%
No. of Trade		268,395	275,288	-2.5%

* Average Interbank Exchange Rate is BDT 123.79 as of Aug 04, 2026

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Figure: Sectorial Turnover (BDT Mn)

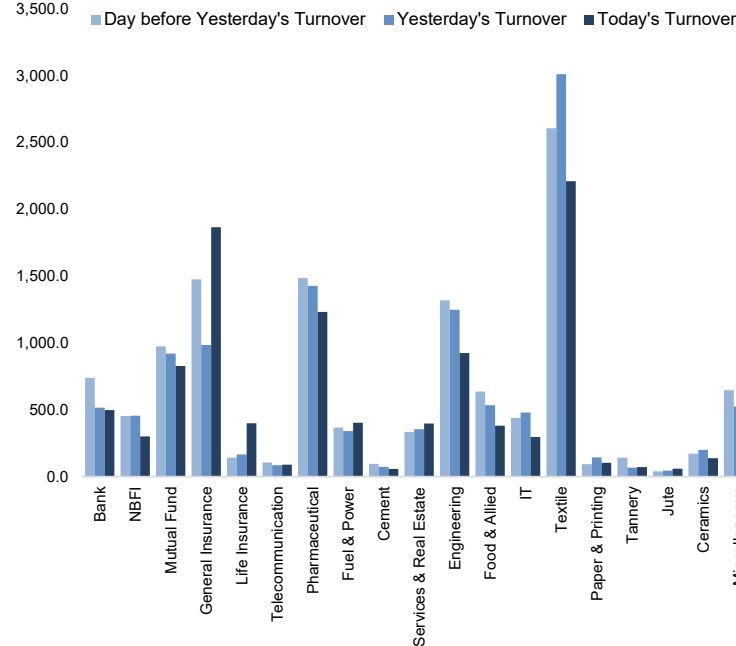
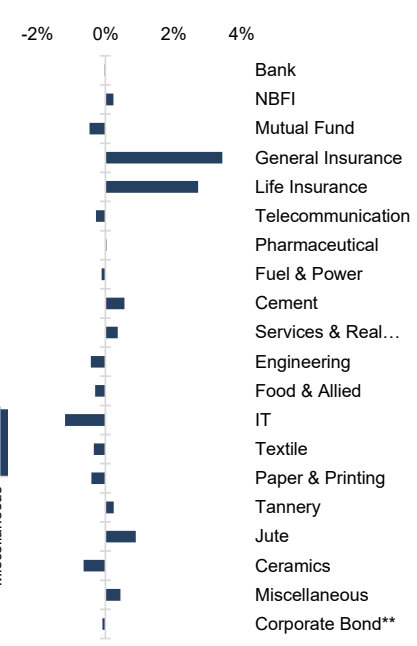


Figure: Sectorial Mcap Change



Market PE 13.9x

Market PB 1.7x

* Market P/E and P/BV calculation excludes
Mutual Fund, Life Insurance, selected NBFIs and Banks

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,578	1,578	-0.37	-0.02%	36	751,930	10.6%	498.1	4.6%	7.4x	0.8x	GP	348,377	9.4%	29.2	9.9x	6.2x
NBFI	1,212	1,210	+2.86	+0.24%	23	115,302	1.6%	299.8	2.8%	NM	1.2x	SQURPHARMA	195,640	5.3%	54.4	7.6x	1.3x
Mutual Fund	742	746	-3.46	-0.46%	34	34,547	0.5%	827.0	7.7%	NM	0.6x	ROBI	166,042	4.5%	52.9	15.9x	2.5x
General Insurance	4,573	4,421	+151.75	+3.43%	43	129,197	1.8%	1,864.5	17.3%	19.1x	1.8x	BRACBANK	146,303	3.9%	88.7	6.4x	1.3x
Life Insurance	1,952	1,900	+51.86	+2.73%	15	55,026	0.8%	398.8	3.7%	NM	NM	BATBC	133,488	3.6%	47.1	23.0x	2.3x
Telecommunication	4,685	4,698	-12.98	-0.28%	3	543,617	7.7%	88.9	0.8%	11.2x	3.9x	WALTONHIL	131,322	3.5%	5.5	13.1x	1.1x
Pharmaceutical	3,209	3,208	+0.94	+0.03%	34	605,663	8.5%	1,230.6	11.4%	11.0x	1.5x	MARICO	85,734	2.3%	11.6	7.6x	18.6x
Fuel & Power	1,180	1,181	-1.28	-0.11%	23	311,463	4.4%	403.2	3.8%	10.0x	0.6x	BERGERPBL	73,600	2.0%	78.4	15.8x	3.4x
Cement	2,194	2,182	+12.24	+0.56%	7	103,245	1.5%	57.5	0.5%	24.0x	2.3x	UPGDCL	71,303	1.9%	13.2	7.7x	1.5x
Services & Real Estate	1,230	1,225	+4.42	+0.36%	9	66,920	0.9%	396.8	3.7%	27.2x	0.5x	LHB	68,056	1.8%	36.3	13.8x	3.7x
Engineering	2,801	2,813	-11.99	-0.43%	42	313,930	4.4%	922.9	8.6%	17.7x	0.9x	PUBALIBANK	60,907	1.6%	39.9	5.1x	0.8x
Food & Allied	13,346	13,386	-40.68	-0.30%	21	243,633	3.4%	381.5	3.5%	35.7x	3.6x	CITYBANK	55,106	1.5%	53.3	3.6x	0.8x
IT	2,682	2,714	-32.14	-1.18%	11	35,513	0.5%	296.2	2.8%	46.2x	2.2x	RENATA	54,274	1.5%	18.4	19.9x	1.5x
Textile	1,504	1,509	-5.15	-0.34%	58	156,404	2.2%	2,208.6	20.5%	NM	1.1x	DUTCHBANGL	49,737	1.3%	27.0	3.8x	0.8x
Paper & Printing	4,874	4,894	-19.94	-0.41%	6	22,830	0.3%	103.3	1.0%	NM	1.5x	ISLAMIBANK	48,944	1.3%	4.4	NM	0.8x
Tannery	2,239	2,234	+5.42	+0.24%	6	26,002	0.4%	71.2	0.7%	NM	1.6x	ICB	40,154	1.1%	7.8	NM	1.5x
Jute	13,928	13,805	+122.69	+0.89%	3	3,038	0.0%	58.2	0.5%	NM	1.9x	EBL	39,777	1.1%	57.2	4.4x	0.8x
Ceramics	509	512	-3.28	-0.64%	5	22,987	0.3%	138.3	1.3%	NM	1.5x	UNILEVERCL	39,366	1.1%	0.6	64.3x	24.1x
Miscellaneous	2,611	2,599	+11.50	+0.44%	15	141,766	2.0%	503.1	4.7%	40.5x	1.1x	POWERGRID	37,466	1.0%	3.8	9.3x	0.3x
Corporate Bond**	18,277	18,292	-15.50	-0.08%	16	40,436	0.6%	0.9	0.0%	NM	NM	PRIMEBANK	36,680	1.0%	21.3	4.0x	0.8x
Treasury Bond**	2,193	2,184	+9.81	+0.45%	232	3,369,086	47.5%	0.8	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
TUNGHAJ	3.3	+10.0%	5.2	NM	NM	SQURPHARMA	109,265	7.0%	7.6x	1.3x	ACMEPL	26.3	+7.8%	360.2	NM	1.7x
GBBPPOWER	11.0	+10.0%	24.2	NM	0.5x	BRACBANK	78,755	5.0%	6.4x	1.3x	SHARPIND	41.6	+5.3%	323.0	NM	5.3x
CENTRALINS	49.3	+9.8%	113.9	24.9x	1.0x	ISLAMIBANK	48,856	3.1%	NM	0.8x	SAPORTL	59.6	+2.8%	256.5	28.1x	1.7x
ICBAMCL2ND	9.3	+9.4%	26.1	NM	0.7x	BXPHARMA	45,196	2.9%	7.5x	1.1x	PRIMEINSUR	62.9	+9.2%	224.0	28.5x	3.0x
PRIMEINSUR	62.9	+9.2%	224.0	28.5x	3.0x	WALTONHIL	43,218	2.8%	13.1x	1.1x	MALEKSPIN	45.3	-1.9%	212.0	8.0x	0.7x
FAREASTFIN	2.4	+9.09%	4.2	NM	NM	PUBALIBANK	41,496	2.6%	5.1x	0.8x	BEXIMCO	23.1	+3.6%	196.5	NM	0.3x
PLFSL	2.5	+8.7%	5.0	NM	NM	CITYBANK	38,370	2.4%	3.6x	0.8x	SAIHAMTEX	25.8	-0.4%	180.5	41.6x	0.6x
ILFSL	2.5	+8.7%	8.6	NM	NM	BATBC	35,308	2.3%	23.0x	2.3x	SAIHAMCOT	22.0	-2.2%	158.1	24.2x	0.6x
FIRSTFIN	5.2	+8.3%	4.1	NM	NM	GP	34,838	2.2%	9.9x	6.2x	DOMINAGE	83.3	+0.2%	145.9	NM	4.9x
UNITEDINS	68.1	+8.1%	72.3	18.0x	2.0x	EBL	27,271	1.7%	4.4x	0.8x	QUEENSOUTH	19.9	+3.6%	139.2	NM	1.2x
						RENATA	26,437	1.7%	19.9x	1.5x						
						LHB	24,915	1.6%	13.8x	3.7x						
						PRIMEBANK	22,914	1.5%	4.0x	0.8x						
						OLYMPIC	19,206	1.2%	16.2x	2.3x						
						UTTARABANK	17,946	1.1%	NM	0.8x						
						ROBI	16,604	1.1%	15.9x	2.5x						
						ALARABANK	16,132	1.0%	21.2x	0.8x						
						BSRMLTD	15,979	1.0%	4.6x	0.6x						
						BEACONPHAR	15,087	1.0%	17.2x	3.2x						
						BEXIMCO	14,574	0.9%	NM	0.3x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RINGSHINE	4.8	-4.0%	13.6	NM	NM						ASIATICLAB	127.0	120.0	7.0	486	58.74
EBL1STMF	5.3	-3.6%	10.6	NM	1x						IPDC	34.0	34.0	2.0	1,341	45.59
FINEFOODS	444.2	-3.5%	14.1	NM	0.6x						SAPORTL	58.5	54.6	3.0	640	35.16
GREENDELMF	5.5	-3.5%	14.1	NM	0.6x						ACIFORMULA	176.0	176.0	1.0	193	33.97
KEYACOSMET	5.6	-3.4%	10.7	NM	0.4x						SIPLC	126.3	126.3	1.0	203	25.64
GQBALLPEN	568.6	-3.3%	21.3	NM	4.1x						DOMINAGE	79.0	77.0	7.0	267	20.84
COPPERTECH	28.3	-3.1%	56.2	41.6x	1.9x						FINEFOODS	480.0	440.0	4.0	40	17.86
MLDYEING	17.1	-2.8%	73.6	NM	1.4x						QUEENSOUTH	18.7	18.5	3.0	950	17.74
CAPMIBBLMF	14.0	-2.8%	17.5	NM	1.2x						SQURPHARMA	220.7	220.0	2.0	75	16.55
AFCAGRO	7.1	-2.7%	1.2	NM	0.4x						GQBALLPEN	612.0	590.0	8.0	24	14.17

*. Bank and NBFI sector PE calculation methodology has been modified.
 ** The base of the Bond Index starts at 100, starting from Jan 13, 2022.
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
ASIATICLAB	127.0	120.0	58.7	486	7	
IPDC	34.0	34.0	45.6	1,341	2	
SAPORTL	58.5	54.6	35.2	640	3	
ACIFORMULA	176.0	176.0	34.0	193	1	
SIPLC	126.3	126.3	25.6	203	1	
DOMINAGE	79.0	77.0	20.8	267	7	
FINEFOODS	480.0	440.0	17.9	40	4	
QUEENSOUTH	18.7	18.5	17.7	950	3	
SQURPHARMA	220.7	220.0	16.5	75	2	
GQBALLPEN	612.0	590.0	14.2	24	8	
MARICO	2,710.0	2,710.0	13.6	5	1	
SHARPIND	41.0	37.5	10.9	280	3	
SONARGAON	103.0	102.0	10.1	98	2	
PRIMEINSUR	54.9	51.9	5.7	110	2	
MALEKSPIN	43.0	43.0	4.8	111	1	
NAVANAPHAR	75.2	75.2	4.3	57	1	
MPETROLEUM	218.0	218.0	3.1	14	1	
AMANFEED	40.9	37.5	2.6	68	3	
GLDNJMF	10.9	10.9	2.4	220	1	
ACMEPL	25.5	22.1	2.3	97	2	
CAPITECGBF	10.0	10.0	2.2	222	1	
AGNISYSL	36.8	36.8	2.0	54	1	
Total			364.6		78	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PADMALIFE		0.0%	0.0%	Record Date	6-Aug-26
ISLAMICFIN		0.0%	0.0%	Record Date	9-Aug-26
BAYLEASING		0.0%	0.0%	Record Date	10-Aug-26
AL-HAJTEX		0.0%	3.0%	Record Date	16-Aug-26
RUPALILIFE		0.0%	12.0%	Record Date	20-Aug-26
PREMIERLEA		0.0%	0.0%	Record Date	23-Aug-26
SANDHANINS		0.0%	12.0%	Record Date	24-Aug-26

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